

Appendix A - IT Strategy Detailed Scope

Task Number	Task or Deliverable Description	Deliverable Due	Acceptance
2.1	<i>Enterprise Information and Technology Strategy</i>		
2.1.1	<i>Task Administration. Overall administration of Task 2.1 "Enterprise Information and Technology Strategy." Task administration ensures clear standards for communication so that the MBTA can provide proper input, feedback, and oversight so that we and the Professional Services Consultant can effectively and successfully partner to execute this work.</i>		
2.1.1.1	Kickoff meeting with the Chief Administrative Officer (CAO), CIO, other executive sponsors, and key executing and oversight staff. Review vendor's approach and staffing. Ensure mutual understanding of key outcomes, deliverables, roles & responsibilities, and timelines.	Within 2 weeks of award	CIO or designee
2.1.1.2	Schedule ESC. Identify, schedule, and interview an executive steering committee (ESC, no more than 6 members) for the overall effort.	Within 2 weeks of kickoff	CIO or designee
2.1.1.3	List of ESC members. List of ESC members. Introductory communication (email, meeting, or other) with ESC members of their role and responsibilities.	Within 2 weeks of kickoff	CIO or designee
2.1.1.4	ESC agendas, meetings, and notes. Written agenda sent at least 24 hours in advance and written notes sent no more than 72 hours after fortnightly ESC meetings on task progress, risks, issues, budget, etc.	Every two weeks	CIO or designee
2.1.2	<i>Research</i>		
2.1.2.1	<i>Current state of Information and Technology Strategy – Compile and review relevant documents</i>		
2.1.2.1.1	Compiled relevant documents and table of contents.	Within 4 weeks of Kickoff	CIO or designee
2.1.2.2	<i>Stakeholder Identification and Interviews. Draft, review, and secure for interview structure / questions with ESC. Identify stakeholder panel of approximately 30 key stakeholders. Schedule, conduct, and document stakeholder interviews.</i>		
2.1.2.2.1	List of stakeholders.	Within 3 weeks of approval of ESC	ESC
2.1.2.2.2	Stakeholder interview preparation, structure, and questions. One key point here is that researchers/interviewers should have a general understanding of each of their interviewees, their personal and their department's role in the organization, and their role in the I&T Strategy. The precious interview time should not be spent on basic overview or background.	Within 5 weeks of approval of ESC	ESC
2.1.2.2.3	Conduct stakeholder interviews.	Within 4 weeks of approval of the interview approach	CIO or designee
2.1.2.2.4	Stakeholder interview verbatim or near-verbatim documentation, provided digitally, plus table of contents including interactive links to individual interviews.	Within 1 week of the final interview	CIO or designee
2.1.2.3	<i>Best Practice Identification and Research – provide an understanding of trends and best practices in information and technology strategy at other organizations – public or private, transportation or not – that share challenging operational missions, significant public-facing technology, and baseline desktop IT needs for frontline staff. Include industry / peer transit agencies, at least two non-transit/transportation organizations. Include both domestic and international organizations.</i>		
2.1.2.3.1	Final list of approximately 6 industry / peer enterprises to research, including a brief justification for the inclusion of each. Include the list of other enterprises that were considered and why they were not ultimately included.	Within 2 weeks of kickoff	ESC
2.1.2.3.2	Collected research materials and notes, including linked table of contents.	Within 5 weeks of kickoff	CIO or designee

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2.1.3	<i>Analysis and Synthesis</i>		
2.1.3.1	<i>Current state of Information and Technology Strategy</i>		
2.1.3.1.1	Brief document (less than 20 pages) of analysis and synthesis of the “Current state of Information and Technology Strategy” research phase. Document must include a 2 page or less Executive Summary.	2 weeks after the related research is complete & approved	ESC
2.1.3.2	<i>Stakeholder Identification and Interviews</i>		
2.1.3.2.1	Brief document (less than 20 pages) of analysis and synthesis of the “Stakeholder Identification and Interviews” research phase. Document must include a 2 page or less Executive Summary.	2 weeks after the related research is complete & approved	ESC
2.1.3.3	<i>Industry Research</i>		
2.1.3.3.1	Brief document (less than 20 pages) of analysis and synthesis of the “Industry Research” research phase. Document must include a 2 page or less Executive Summary.	2 weeks after the related research is complete & approved	ESC
2.1.4	<i>Final Strategy</i>		
2.1.4.1	<i>Summary Document – brief (15-20 pages) document that is accessible to technical and non-technical staff. Written in an accessible, inviting, human-centered manner. Must include an executive summary of 2 pages or less. For the purposes of bidding on the work, we expect other sections may include: Diagnosis and Direction (business context; business objectives, goals, and strategies), Strategic Actions (business capabilities; information and technology; people, culture, and ecosystem considerations), Guardrails (strategic principles; metrics), and Risks and Issues. However, we want the structure of the document to follow from what the Professional Services Consultant finds, in collaboration with the ESC for the final product.</i>		
2.1.4.1.1	Summary Document detailed outline, including section names, page lengths, and writing assignments (e.g., who is assigned as primary author).	8 weeks after Kickoff	CIO (or designee)
2.1.4.1.2	Summary Document rough draft: at least one section is substantially complete, though any tables and figures may be low fidelity or only a descriptive placeholder. Other sections show meaningful progress from the outline.	12 weeks after Kickoff	ESC
2.1.4.1.3	Summary Document almost-final draft: all sections are substantially complete, though may have a few placeholders, open questions for discussion, or awaiting the result of analysis. At least one page is proposed as final, and exemplary of the level of polish proposed for the final draft.	16 weeks after Kickoff	ESC
2.1.4.1.4	Summary document final draft. All sections are complete and polished with no loose ends.	20 weeks after Kickoff	ESC and CAO
2.1.4.1.5	Approach to final communication to stakeholders: determine and decide approach (Meeting? Email? Both? Other?) and outline to communicate and share the final strategy with stakeholders.	16 weeks after Kickoff	ESC
2.1.4.1.6	Final communication to stakeholders.	21 weeks after Kickoff	ESC and CAO
2.2	<i>(OPTIONAL) Strategy for the Information and Technology Organization</i>		
2.2.1	<i>Task Administration – Overall administration of task 2.2 Strategy for the Information and Technology Organization. Task administration ensures clear standards for communication so that the MBTA can provide proper input, feedback, and oversight so that we and the Professional Services Consultant can effectively and successfully partner to execute this work.</i>		
2.2.1.1	Kickoff meeting with the CIO, other executive sponsors, and key executing and oversight staff. Review Professional Services Consultant’s approach and staffing. Ensure mutual understanding of key outcomes, deliverables, roles & responsibilities, and timelines.	Within 2 weeks of exercising Task 2.2	CIO or designee
2.2.1.2	Identify, schedule, and interview an executive steering committee (ESC, no more than 6 members) for the overall effort.	Within 2 weeks of Kickoff	CIO or designee

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2.2.1.3	List of ESC members. Introductory communication (email, meeting, or other) with ESC members of their role and responsibilities.	Within 2 weeks of Kickoff	CIO or designee
2.2.1.4	Written agenda sent at least 24 hours in advance and written notes sent no more than 72 hours after fortnightly ESC meetings on task progress, risks, issues, budget, etc.	Every two weeks, beginning from the Kickoff	CIO or designee
2.2.2	<i>Research</i>		
2.2.2.1	<i>Current state of Information and Technology Organization – Compile and review relevant documents</i>		
2.2.2.1.1	Compiled relevant documents and table of contents.	Within 4 weeks of Kickoff	CIO or designee
2.2.2.2	<i>Stakeholder Identification and Interviews – Draft, review, and secure for interview structure / questions with ESC. Identify stakeholder panel of approximately 30 key stakeholders. Schedule, conduct, and document stakeholder interviews.</i>		
2.2.2.2.1	List of stakeholders.	Within 3 weeks of approval of ESC	ESC
2.2.2.2.2	Stakeholder interview preparation, structure, and questions. One key point here is that researchers/interviewers should have a general understanding of each of their interviewees, their role in the department, and their role in the Strategy for the I&T Organization. The precious interview time should not be spent on basic overview or background.	Within 5 weeks of approval of ESC	ESC
2.2.2.2.3	Conduct stakeholder interviews.	Within 4 weeks of approval of the interview approach	CIO or designee
2.2.2.2.4	Stakeholder interview verbatim or near-verbatim documentation, provided digitally, plus table of contents including interactive links to individual interviews.	Within 1 week of the final interview	CIO or designee
2.2.2.3	<i>Best Practice Identification and Research – provide an understanding of trends and best practices in information and technology strategy at other organizations – public or private, transportation or not – that share challenging operational missions, significant public-facing technology, and baseline desktop IT needs for frontline staff. Include industry / peer transit agencies, at least two non-transit/transportation organizations. Include both domestic and international organizations.</i>		
2.2.2.3.1	Final list of approximately 6 industry / peer enterprises to research, including a brief justification for the inclusion of each. Include the list of other enterprises that were considered and why they were not ultimately included.	Within 2 weeks of kickoff	ESC
2.2.2.3.2	Collected research materials and notes, including linked table of contents.	Within 5 weeks of kickoff	CIO or designee
2.2.3	<i>Analysis and Synthesis</i>		
2.2.3.1	<i>Current state of Strategy for the Information and Technology Organization</i>		
2.2.3.1.1	Brief document (less than 20 pages) of analysis and synthesis of the “Strategy for the Information and Technology Organization” research phase. Document must include a 2 page or less Executive Summary.	2 weeks after the related research is complete & approved	ESC
2.2.3.2	<i>Stakeholder Identification and Interviews</i>		

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2.2.3.2.1	Brief document (less than 20 pages) of analysis and synthesis of the “Stakeholder Identification and Interviews” research phase. Document must include a 2 page or less Executive Summary.	2 weeks after the related research is complete & approved	ESC
2.2.3.3	<i>Industry Research</i>		
2.2.3.3.1	Brief document (less than 20 pages) of analysis and synthesis of the “Industry Research” research phase. Document must include a 2 page or less Executive Summary.	2 weeks after the related research is complete & approved	ESC
2.2.4	<i>Final Strategy</i>		
2.2.4.1	<i>Summary Document – brief (15-20 pages) document that is accessible to technical and non-technical staff. Written in an accessible, inviting, human-centered manner. Must include an executive summary of 2 pages or less. For the purposes of bidding on the work, we expect other sections may include: Diagnosis and Direction (business context; business objectives, goals, and strategies), Strategic Actions (business capabilities; information and technology; people, culture, and ecosystem considerations), Guardrails (strategic principles; metrics), and Risks and Issues. However, we want the structure of the document to follow from what the Professional Services Consultant finds, in collaboration with the ESC for the final product.</i>		
2.2.4.1.1	Summary Document detailed outline, including section names, page lengths, and writing assignments (e.g., who is assigned as primary author).	8 weeks after Kickoff	CIO or designee
2.2.4.1.2	Summary Document rough draft: at least one section is substantially complete, though any tables and figures may be low fidelity or only a descriptive placeholder. Other sections show meaningful progress from the outline.	12 weeks after Kickoff	ESC
2.2.4.1.3	Summary Document almost-final draft: all sections are substantially complete, though may have a few placeholders, open questions for discussion, or awaiting the result of analysis. At least one page is proposed as final, and exemplary of the level of polish proposed for the final draft.	16 weeks after Kickoff	ESC
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2.2.4.1.5	Approach to final communication to stakeholders: determine and decide approach (Meeting? Email? Both? Other?) and outline to communicate and share the final strategy with stakeholders.	16 weeks after Kickoff	ESC
2.2.4.1.6	Final communication to stakeholders.	21 weeks after Kickoff	ESC and CIO